Implementing a proactive chat widget in an academic library

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- 25,000 FTE students
- Known for engineering and nursing degree programs
- RN-BSN programs is largest online student population
- EZproxy data shows over 20,000 hits to access electronic resources from the College of Nursing
Helping Online Students

• Invisible compared to in-person students

• See site visits and guide views, but not sure if needs were met
Ways to Reach Online Students

• Redesign website
• Place chat widget in points of need
• Change chat model
Redesign Website

- Moved from Cascade to Drupal
- HTML Template allows left and right border on side to not change
- Only center part of page changes, so no matter where they navigate they’ll see help
Students and faculty of all disciplines gathered at the Central Library to take part in the HerStory Edit-a-thon last week, aiming to diversify the aspects of editing and content creation within Wikipedia. Read more in The Shorthorn.
Chat Widget Embedded in Points of Need

- Home page
- Library catalog
- Subject guides
- Databases
  - Ebscohost
  - Proquest

Call us at 817.272.3395 or 888.565.9023
Text us at 817.727.8395
Email us at AskUs@uta.edu
Progression of Chat Model

• Previous chat model-staffed with reference assistants and librarians
• Handled incoming questions through library-ref email
• Hours
  – Monday-Thursday 8am to midnight
  – Friday 8am to 6pm
  – Saturday 9am to 6pm
  – Sunday 10am to midnight
Consolidated Service Desk Chat Model

• Combined circulation and reference services
• Staffed by service desk staff, student workers, librarians and volunteers
• Increased hours to 24/5
  – Open Sunday 9am to Friday 8pm
  – Saturday 9am to 8pm
• Library-ref email changed to askus@uta.edu
• Assigned question responsibility based on READ Scale
Reference Effort Assessment Data (READ) Scale

- “Six-pint scale tool for recording vital supplemental qualitative statistics gathered when reference librarians assist users with their inquiries or research–related activities by placing an emphasis on recording the effort, skills, knowledge, teaching moment, techniques and tools utilized by the library during a reference interaction”- Bella Karr Gerlich

- 1 as the lowest with minimal effort
  - Less than five minutes

- 6 as the highest with maximum effort
  - Most time and effort, may require follow up
  - PhD and faculty research
Assignment of Questions

Service Desk staff
- Answers questions 1-3
- Informational, directional, known item, equipment troubleshooting, and reference
- Refer to library staff when needed

Librarians
- Answer all questions on scale
- Except circulation related transactions
  - Renew books, library fines
- Refer to library staff when needed
Increased chat usage
More in-depth reference questions
Proactive Chat Widgets

• Differ because they don’t rely on the user to initiate chat
• Triggers based on time spent on website, visiting a certain page, or clicking on a certain item
• Previously used on business websites
Chat Task Charge

• Investigate implementing proactive chat and screen sharing
• Increase chat usage
Chat Task Force

• Library assistant- administrator for Libanswers and Libchat, shared staffing of chat
• Health sciences librarian- expertise on nursing, leadership on teaching and learning within library
• Business librarian- extensive reference experience, shared staffing of chat
• Online librarian- administrator for LibGuides, oversaw tutorial creation
Chat Software Review

- Develop criteria
  - Needs and wants
  - Avoid bias
  - Helpful when making a decision
  - Budget
- Environmental Scan
- Explore current chat software
Chat Criteria

**Needs**
- Over 100 accounts
- Multiple staff on chat
- Multiple incoming users
- Transfer chats
- Incorporate with Springshare, Summon, and databases

**Wants**
- Ability to attach files
- Preview questions before answering
- Screen sharing
- Pull statistics at will
zendesk chat (formerly Zopim)

• Handle multiple chats
• Multiple users online
• Several pricing points
Explore Current Chat Software

- Help to add additional criteria for chat review
- Might discover option to have proactive chat already
Screen sharing

- Replicate in-person help by sharing screen
- In-depth consultations for chats over 20 minutes
Screen sharing Criteria

- Free to use
- No download required
- No camera required
Screen sharing

- Uses an URL link
- Chat feature within
- Group chat
- Give user control of mouse
Designing the Widget

- Created chat icon
- Synced colors with website
- Widget placed on right-hand side of the screen
Pilot testing

• Set on library website during June 2016
• Kept chat text on website
• Chat timer set to 0
Adding chat widget to points of need

Proactive
• Summon
• Proquest

Embedded
• Libguides
• Ask.uta.edu home page
• Ebscohost
Weekend Before School Starts…

- RN-BSN students overwhelmed staff on chat weekend before school with first assignment
- Average of 9 questions an hour
- Change chat staffing from 1 to 2 staff on chat each hour, 3 during peak times
Setbacks

Problem

• Service desk staff departure
  – 40 hours of desk coverage

Resolution

• Staffing changed to branch libraries
• Librarians chat hours increased
• Volunteers
Setbacks

Problem
• Funding prioritized to other needs on campus

Resolution
• Chat hours reduced
• Chat trigger turned off
• Automatic chat logoff at closing times
• Screen sharing service on hold
Restarted proactive chat widget

Chats seen to stabilize middle of semester
New hires starting soon
Timer set to 60 seconds
Assessment

• Statistics
• Chat transcripts
• Staff feedback
• WORF
Statistics

• Missing data
  – Dropped chats due to connection issues
    • User would reconnect
  – Juggling multiple chats staff didn’t enter statistics

• More 1 and 2 READ Scale level questions
  – Contradicted research showing increase in reference questions
  – Analyzed statistics entered as a reference question
Add Transaction

Dataset: More than 20 minutes (Consultation)

Question
Type the question (140 chars max)

Answer
Type the answer here.

Include this transaction in the public knowledge base

See if similar questions are already in the public knowledge base:

Time Stamp: Current

Answered By: Pyburn, Lydia

Internal Note:

READ scale

Location
Office
Faculty Office
Service Desk
Elsewhere in the Library
Elsewhere on Campus
Off-campus
FabLab
Academic Plaza
Virtual Service Desk

Question Source
Appointment
Drop-In
Email
Chat/Text
Telephone
Blackboard

Status
Undergraduate Student
Graduate Student
Faculty
Staff
Alumni
Visitor
Don't Know

Nature of Transaction
Research Assistance
Software/Technology
Copyright/Scholarly Co-Archives Request
Instruction Planning
Collection Development
Outreach/Networking
Course Reserve
General Library Info
Digital Identity Impact

Appointment Prep Time
0 min.
1-19 mins
20-39 mins
40-69 mins
1-1.5 hrs
1.6-2 hrs
2.1-3 hrs
3.1-4 hrs
4.1 hrs+

A&H
Architecture
Art & Art History
English
History
Linguistics
Modern Languages
Music
Philosophy & Classics
Theater Arts
Women's Studies

Social Sciences
Accounting
Anthropology
Communication Studies
Criminal Justice/Crime
Economics
Education: Curriculum & Instruction
Education: Leadership & Administration
Health Care Administration
Information Systems & Technology

STEM
Aerospace
Bioengineering
Biology
Chemistry
Civil Engineering
Computer Science
Earth & Environmental Science
Electrical Engineering
Environmental Engineering
Geology

Additional information
First Year English
First Year Seminar
Data & E-Science
Digital Humanities
GIS/SPSS/Data Analysis
Government Information
Non-Academic Dept.
Non-University Affiliate
Special Collections
FabLab

Transaction Length
1-19 mins
20-39 mins
40-69 mins
1-1.5 hrs
1.6-2 hrs
2.1-3 hrs
3.1-4 hrs
4.1 hrs+

Submit
Submit & Clear

What's the difference?
Chat Transcripts

Problem

- Known item searches marked as reference questions
- Librarians ranking questions as level of difficulty

Resolution

- Created one-page guide of READ Scale for reference
- Additional training

Client Name: Patron
Initial Question: I was wondering if I could borrow a calculator from the library
Librarian: Let me check the website. Back shortly
Librarian: I do not see anything on the website. I suggest you call the library circulation desk at 817-272-3395
Staff Feedback

- Scheduled meeting with no supervisors
- Focus to fix, not place blame
- Honesty and anonymity
Staff Feedback

• Felt they couldn’t refer questions
• Chat end hour before closing
• Desired chat widget to remain closed once “No Thanks” clicked
• Users less inclined to discover on their own
• User disconnect from chat if they didn’t get desired response, then reconnect trying to get another person
A total of 7 messages exchanged.

16:13:20 **Lydia Pyburn:** Hi, no the Architecture library is not open 24 hours.
16:13:32 Guest23973315: can you tell me when it is then...
16:13:55 **Lydia Pyburn:** Sure let me get you the link to our hours.
16:13:57 Guest23973315: how late is the library open and when will it open tomorrow morning? this is what i need to know.
16:14:06 Guest23973315: ugh nevermind
16:14:18 **Lydia Pyburn:** [http://library.uta.edu/hours](http://library.uta.edu/hours)
16:14:30 **Lydia Pyburn:** They're open till midnight and open at 8 am.
Qualitative Chat Transcript Analysis

• Develop a rubric based on service desk training
  – Also used as secret shopper

• Adapted RUSA Guidelines

• LibChat offers chat ratings, not used since 61% chats are not rated
<table>
<thead>
<tr>
<th>Rubric</th>
<th>In-Person</th>
<th>Online</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>** Welcoming**</td>
<td>No greeting, no eye contact, curt greeting, rushes through transaction</td>
<td>Greets with hello, some eye contact, no alternatives offered</td>
<td>Greets and offers assistance, eye contact, sincere and polite, lets user pace the transaction, offer alternatives</td>
<td>Greets and offers assistance/restates question/affirms help, empathizes with user's need, maintains contact with users, uses positive language</td>
</tr>
<tr>
<td>** Open-Questions**</td>
<td>Not asking questions, asks yes or no questions</td>
<td>Asks some open-ended questions</td>
<td>Asks many open-ended questions letting the user guide the transaction</td>
<td>Asks many open-ended questions letting the user guide the transaction</td>
</tr>
<tr>
<td>** Repeat**</td>
<td>Doesn’t repeat user’s questions, makes assumptions, no explanation of process</td>
<td>Repeats user’s questions for clarification but minimal explanation of process</td>
<td>Connects open-ended questions to discover actual need and correct misinformation, explanation of process and policies</td>
<td>Repeats user’s questions for clarification, explains process or steps to find information, provides explanations</td>
</tr>
<tr>
<td>** Follow-up**</td>
<td>Doesn’t offer do satisfaction check</td>
<td>Does satisfaction check to make sure need is met, offers referral to staff, offers referral to patron but doesn't contact staff</td>
<td>Does satisfaction check, sends referral to appropriate staff, offers referral to patron, escorting if possible, encourages use of library</td>
<td>Checks if need has been met, offers assistance for other help during session, sends referral email to appropriate staff and includes user, encourages user to use service again</td>
</tr>
</tbody>
</table>

Rubric adapts RUSA Guidelines for Behavioral Performance of Reference and Information Service Providers
http://www.ala.org/rusa/resources/guidelines/guidelinesbehavioral
Overall chats doubled from 4020 to 8120
# Canned Messages

<table>
<thead>
<tr>
<th>Searched</th>
<th>Okay, just to make sure I don't duplicate the work you've done, can you tell me where you searched and what terms you used?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantitative</td>
<td>We have a libguide that has some tips about having to search for quantitative articles. I'm going to send you the link. <a href="http://libguides.uta.edu/researchtype/quantitative">http://libguides.uta.edu/researchtype/quantitative</a></td>
</tr>
<tr>
<td>Ezproxy URL</td>
<td><a href="https://login.ezproxy.uta.edu/login?url=">https://login.ezproxy.uta.edu/login?url=</a></td>
</tr>
<tr>
<td>Ending chat</td>
<td>I will be closing the chat window now. If you have any other questions, then please feel free to ask us again. Thank you for using this service and have a great day!</td>
</tr>
<tr>
<td>Databases A-Z</td>
<td>If you open another tab and go to the library home page, library.uta.edu. On the left hand side you'll see Research and underneath that is Databases A-Z.</td>
</tr>
<tr>
<td>Anything Else</td>
<td>You're welcome. Is there anything else I can help you with today?</td>
</tr>
</tbody>
</table>
Email communication between departments

• Health science send out email for upcoming assignments
  – Steps to handle question
  – Directions to resources and guides
  – When to refer

• Database issues and policy changes

• When needed help on chat
Recommendations

• Pilot test
• Ongoing training
• Chat policy
• Avoid staff burnout
• Maintenance checks
Pilot Test

• Compatibility issues between chat software and website/databases/catalog
• Insight to increase chat transactions and adapt staff model
• Look for free software, trials or demos
Ongoing Training

- Retain skills and knowledge
- Improve research skills with in-depth reference questions
- Adopt a conversational tone to not be transactional
  - Include user’s name
Chat Policy

• Detail purpose of chat
• Responsibilities and expectations of staff
• Manage expectations of users
  – Response time to help
Staff Burnout

- Check statistics to ensure adequate staffing
- Adjust chat trigger timer
- No more than four hours
- Acknowledging feedback can help morale
Maintenance Checks

• Updates can create errors or unforeseen issues
  – Chat icon image turned vertically
  – Update to Summon removed distinct widget code and reverted to website
    • No distinction from where questions asked
  – Update FAQs and information before every semester
Thanks

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• Kalei Malczon
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• Fen Lu
• Ashley Zmau
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UT-San Antonio
• William Glenn
Questions?

Contact me at llpyburn@uta.edu